



COUNTY OF SAN DIEGO
Great Government Through the General Management System – Quality, Timeliness, Value
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

RETIREMENT DISABILITY SPECIALIST
RETIREMENT SENIOR DISABILITY SPECIALIST

Class No. 002351
Class No. 002350

■ CLASSIFICATION PURPOSE

To analyze, review, and investigate retirement disability claims filed by members of the San Diego County Employees Retirement Association (SDCERA) and/or departments; to evaluate and interpret relevant disability provisions and medical information to determine eligibility for disability retirement benefits; and to perform related work.

■ DISTINGUISHING CHARACTERISTICS

The Retirement Disability Specialist is a professional class series responsible for the analysis, review and investigation of retirement disability claims filed by San Diego County Employee Retirement Association members and determining members' eligibility for disability retirement benefits. Positions in these classes are allocated to the San Diego County Employee Retirement Association.

Retirement Disability Specialist

This is the journey-level class in this series. Under general supervision, incumbents in this class analyze, review and investigate retirement disability claims, report and present findings of these investigations, and provide high quality service to members of the public and employees.

Retirement Senior Disability Specialist

This is the first-line supervisor class in this series. Under general direction, incumbents in this class perform the most difficult and complex retirement disability cases. Incumbents also provide leadership, supervision, and training to employees in various professional, paraprofessional and support positions in the department. This class reports to a Retirement Member Services Manager. This class differs from the lower level of Retirement Disability Specialist in that the Retirement Senior Disability Specialist handles the more complex and specialized caseload and supervises subordinate staff. Retirement Senior Disability Specialist differs from the Retirement Member Services Manager classes in that the latter are responsible for administering the disability functions from initial application to benefit payments upon approval of disability application.

■ FUNCTIONS

The examples of functions listed in the class specification(s) are representative but not necessarily exhaustive or descriptive of any one position in the class(es). Management is not precluded from assigning other related functions not listed herein if such duties are a logical assignment for the position.

Retirement Disability Specialist

Essential Functions:

1. Interviews applicants and reviews disability claim forms.
2. Conducts records, office, and field investigations to compile and evaluate information.
3. Reviews medical, workers' compensation, employers', and independent physicians' records.
4. Interviews witnesses.
5. Reports findings and analysis in written form.
6. Prepares claims for legal review, recommendation, and consideration for approval by the Retirement Board.
7. Interprets and implements disability retirement policies, provisions and laws to employees, County officials, attorneys, physicians and the public.
8. Works collaboratively with medical providers and other County departments on disability retirement issues.
9. Investigates possible fraudulent claims.

10. Ensures that State statutes and County policies are followed in the processing of disability retirement claims.
11. Summarizes data.
12. Prepares reports for the Retirement Board.
13. Provides courteous, high quality service to members of the public by personally responding to requests for service or appropriate referral.
14. Makes presentations to the Retirement Board regarding disability cases and performs outreach activities.

Retirement Senior Disability Specialist

In addition to the functions of the Retirement Disability Specialist

Essential Functions:

1. Handles the most specialized, complex retirement disability caseload.
2. Represents Member Services Manager in meetings with County departments, medical services providers and outside disability legal providers.
3. Trains, directs and reviews the work of subordinate professional, paraprofessional and support staff performing case management and support functions.
4. Supervises professional, paraprofessional, and support staff.

■ KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- County Employee Retirement Act of 1937.
- Terminology used in the medical profession related to the cause, treatment and prognosis of medical conditions
- County personnel rules, practices and procedures.
- State and County retirement codes.
- Telephone, office, and online etiquette.
- County customer service objectives and strategies.

Skills and Abilities to:

- Understand and interpret laws, policies, and ordinances.
- Read and comprehend medical reports.
- Calculate and prepare mathematical data.
- Communicate clearly, concisely, and effectively, both orally and in writing.
- Establish and maintain effective working relationships with employees, officials and the public.
- Use computer applications to perform automated case management activities.
- Communicate effectively with a variety of individuals representing diverse cultures and backgrounds and function calmly in situations, which require a high degree of sensitivity, tact and diplomacy.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or referral.
- Provide prompt, efficient and responsive service.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.

Retirement Senior Disability Specialist (in addition to the above)

- Analyze complex retirement disability claims
- Train, supervise and evaluate subordinate staff
- Deliver formal and informal presentations and recommendations to various audiences
- Lead and establish teamwork among subordinate professional, paraprofessional and support staff

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. Examples of qualifying education/experience are: A bachelor's degree from an accredited college or university in business administration, finance, economics, accounting or other closely related field, AND:

Retirement Disability Specialist:

1. Two (2) years experience in a public or private agency (preferably a California government agency) in the direct administration of, or managing, reviewing, evaluating, investigating, and processing reports and claims concerning on-the-job injuries, job-related illnesses, or physical disability claims.

Retirement Senior Disability Specialist

1. Four (4) years experience in a public or private agency (preferably a California government agency) retirement office in the direct administration of, or managing, reviewing, evaluating, investigating, and processing reports and claims concerning on-the-job injuries, job-related injuries, or physical disability claims, OR
2. Two (2) years experience as a Retirement Disability Specialist with SDCERA.

Note: Additional years of experience as described above may substitute for the education requirement on a year-for-year basis.

■ ESSENTIAL PHYSICAL CHARACTERISTICS

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification(s). Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.

Continuous upward and downward flexion of the neck. Frequent: sitting, repetitive use of hands to operate computers, printers and copiers. Occasional: walking, standing, bending and twisting of neck, bending and twisting of waist, squatting, simple grasping, reaching above and below shoulder level, and lifting and carrying of files weighing up to 10 pounds.

■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

License

A valid California class C driver's license, which must be maintained throughout employment in these classes, is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in these classes may be required to use their own vehicle.

Certification/Registration

None Required.

Working Conditions

Office environment; exposure to computer screens.

Employees in these classes are responsible for handling confidential retirement personnel and/or employment transactions and confidential medical information.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Probationary Period

Incumbents appointed to permanent positions in these classes shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

New: September 12, 1997
Retitled: June 28, 2000 (Retirement System Disability Specialist)
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Revised: March 28, 2005
Revised: August 11, 2005

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